

ePlanReview Tutorial



***Quick Reference Guide for Electronic
Plan and Document Submission with
Step by Step Applicant Training***



Welcome to ePlanReview

ePlan Review is a workflow management system designed to provide an efficient web-based plan check process allowing applicants to submit construction plans and supporting documents online saving you time and money by reducing trips to City Hall and eliminating the need to print paper plans during the permit application process.



Prerequisites

Download the Project-Dox Software Components (REQUIRED)

Advisory Note: For best performance with the current version of our ePlan software, use Internet Explorer Version 11 or newer

Turn off Pop Up Blockers for your preferred browser: Pop Up Blocking is controlled by the “Tools” of your internet browser under “Internet Options”, “Privacy tab” and “Turn Off Pop-up Blocker”

The Building & Safety Division ePlan project application submittal webpage is <https://riversideca.gov/cedd/building-safety/online-services/eplan-review>

Please go to <https://riversideca.gov/cedd/building-safety/online-services/eplan-review> to access the City of Riverside ePlan customer portal and login page

When using Internet Explorer Version 10: Select “Tools” on your internet browser, then “About” Internet Explorer, it must be operated in “Compatibility Mode”. When on the webpage <https://riversideca.gov/cedd/building-safety/online-services/eplan-review> click the “Tools” option for the internet browser, select “Compatibility View Settings” and adding riversideca.gov to the “Compatibility View” website



Starting ePlan Review

1. The **ePlanReview** application link is located on the **Building & Safety Division** website.
2. The **ePlanReview** process starts with an application. Click the **“ePlan Review”** button under **“Online Services”** to access the application page.
3. The application page provides a brief description of the **ePlanReview** process. Scroll to the bottom of this page to view the application options.



A screenshot of the City of Riverside website. The top navigation bar includes links for Arts & Cultural Affairs, Building & Safety, Code Enforcement, Community Development Block Grant, Economic Development, Neighborhood Engagement, Planning, and Real Property Services & Successor Agency. The breadcrumb trail reads "Building & Safety / Online Services / ePlan Review". The left sidebar menu lists: Building & Safety, Build Riverside, Online Services (with a dropdown arrow), Public Permit Portal, ePlan Review (circled in blue with an arrow pointing to it), Search Permits, Building Codes & Design Criteria (with a dropdown arrow), and Building & Safety Services (with a dropdown arrow). The main content area is titled "ePlan Review" and contains a paragraph describing the electronic plan review solution. To the right of the text is a photograph of a man in a maroon shirt working at a computer workstation with multiple monitors.



Application Options

There are two application types for ePlan submittals: **Building & Safety Plan Check and Planning Cases or Permits**

The **ePlanReview Tutorial** includes the instructions and User Requirements

Advisory Note: Preferred File Types include: PDF, DWF, DWG, JPEG

Application submitted to the **Building & Safety Division: (951) 826-5800**

Application submitted to the **Planning Division contact: (951) 826-5371**

Access to ePlanReview **AFTER** a permit or case number has been assigned and you receive invite email into the software

With no need to purchase special software as only internet access is required, our system can accept over 250 file types and be updated and viewed from anywhere. Please carefully review the tutorial titled "ePlanReview Tutorial" below for further information.

Please contact Building & Safety at (951) 826-5697 should you have any questions related to your ePlan application.

Advisory: The use of Internet Explorer 11 or thereafter is the recommended browser for this version of ePlanReview software.

[EPLANREVIEW TUTORIAL](#)

[SYSTEM USER REQUIREMENTS](#)

This electronic solution is available for both building plan check and planning cases.

Please note that all Initial projects must first submit the appropriate application below.

Once your project application is received and processed, you will receive an email invitation with the next steps needed to create a username and proceed with the electronic submission process using the upload link below.

[Building Plan Check Application](#)

[Planning Case Application Form](#)

[Upload My Plans Electronically Now](#)

Please contact Building & Safety or Planning by calling (951) 826-5800 should you have any questions related to your application.



Application Process

Building & Safety / Online Services / ePlan Review / Plan Check Application Form

The **B&S** application is being used for this demonstration:

The same process applies for the Planning application

The information fields are similar to the project details requested by front counter staff like project location, applicant details, valuation owner information, and a complete project description

Complete the application form and click submit. You will receive a confirmation email that we received your application

- Building & Safety
- Build Riverside
- Online Services ▾
- Public Permit Portal
- ePlan Review ▾
- Search Permits
- Building Codes & Design Criteria ▾
- Building & Safety Services ▾
- Forms, Handouts & Bulletins ▾
- Standard Plans & Details
- Resilient Riverside
- Contact

Plan Check Application Form

Location

Project Address *

Suite

Applicant

Applicant Company Name

Applicant First Name

Applicant Last Name

Address

City

State

Zip

Email

Phone



Building & Safety Application

An email contact is required for all ePlan Review projects. This email account will be used to communicate the status of the project and to request information.

If the owner is not the same as the applicant, the owner's email can also be added to the application to have equal access to the permit or project.

Provide a detailed project description and value of work (valuation)

Click submit once all of the details are complete



Owner Last Name

Address

City

State

Zip

Email

Phone

Cell Phone

Project

- Non-Residential
 Residential

Description

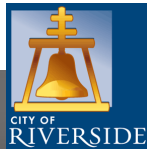
(Please provide your project's valuation in the description.)

Submit

- Project Valuation (value of proposed work) is required
- Provide a clear, detailed job description.

What Happens Next?

1. City Staff will receive an email to review the online application. **Please allow two to three working days from the date of submittal for staff to review and process your project prior to reaching out for an update**
2. Staff will contact you if they require additional information prior to approving the start of the permit/project
3. Any locations for projects outside of the City boundaries will be returned and advised by email
4. If the information is sufficient to start the permit/project, staff will assign a permit/case number and send an invitation to start the ePlan Review process **and invite you into the system**



ePlan Review Invitation email

- ❑ All new permits and projects in **ePlanReview** will start with an email invitation into the software
- ❑ A user account will be established for each email address
- ❑ For first time users, the invitation will include a temporary password and a link to the **ePlanReview** software
- ❑ If your company has multiple users, contact staff at (951) 826-5800 to add multiple accounts
- ❑ Existing **ePlanReview** users will receive invitations to new projects but will not receive a temporary password

Permit Plan Check Invitation

Hello TEST COMPANY NAME:

Welcome to the electronic plan check system. This project invitation has been sent to you in response to your permit request. A project has been created to allow you to electronically upload your CAD drawings & other supporting documentation for plan check review. To access your new project, follow this instructions below:

1. Click the Project Access link below
2. Enter your User Login and Temporary Password
3. Click on the Project link on the "My Projects" page
4. Click on the "Drawings" folder for plans and "Documentation" folder for supporting documentation
5. Click the "Upload Files" button and follow the instructions to upload your CAD drawings
6. Your drawings have now been submitted for plan check review

CAD Drawing files supported are: .DWG, .DGN, .DWF, .DXF, .PDF, .TIFF, .PLT

User Login	ePlanReviewTest@gmail.com
Temporary Password	B6C345E
Project Permit #	BP 2020-02000
Plan Check Coordinator	Building & Safety Division
Plan Check Coordinator's Email	building@riversideca.gov
Project Permit Access Link	

← Temporary Password

← Permit number

← Link to ePlan Review

Contact the Plan Check Coordinator if you have questions regarding this project. Please do not reply to this email.

The link to the eplan review, customer portal and login is:
<https://eplans.riversideca.gov/ProjectDox/index.aspx>

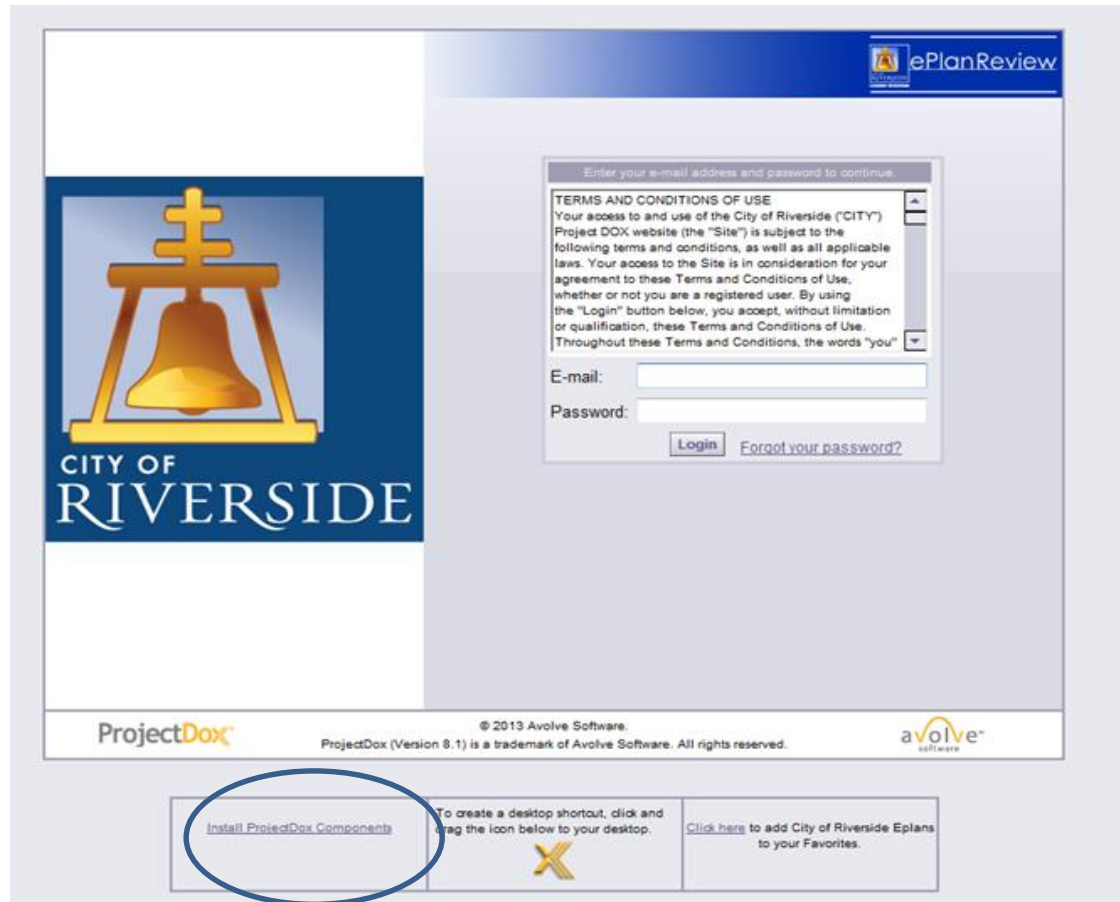


First Time Users

ePlanReview needs to add a few features to your computer to operate effectively:

- ❑ For the eplan customer portal and login webpage please go to:
<https://eplans.riversideca.gov/ProjectDox/index.aspx>
- ❑ Please ensure you have turned off Pop-Up Blocker from your browser settings
- ❑ Internet Explorer 10 will need to run in Compatibility Mode –
Recommend browser is Explorer 11 or newer
- ❑ Click on the hyperlink “Install ProjectDox Components”

Note: The following screens are representative of the installation process. Your experience may vary depending on your browser and computer settings.

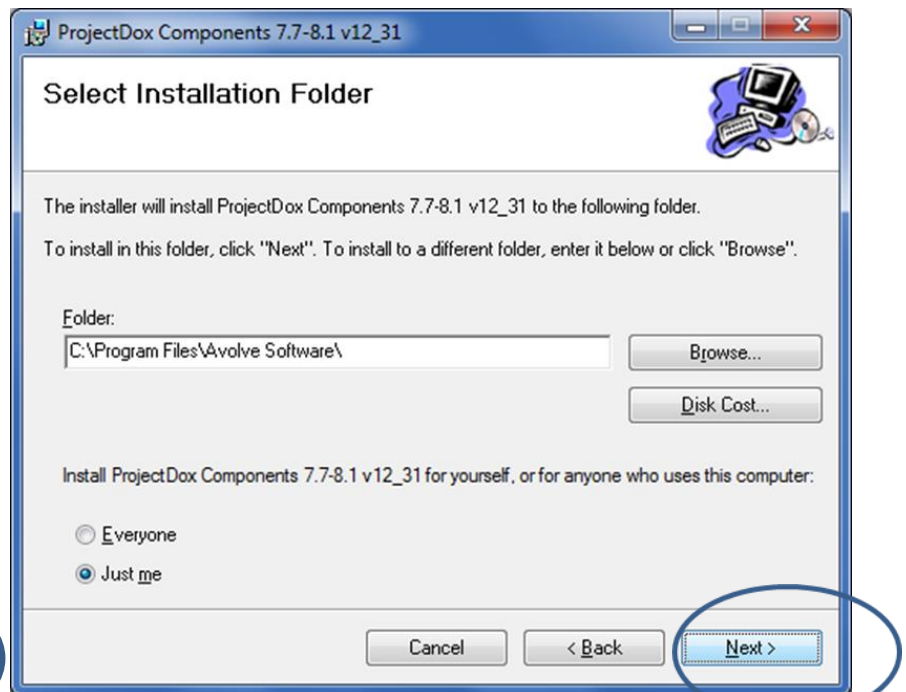
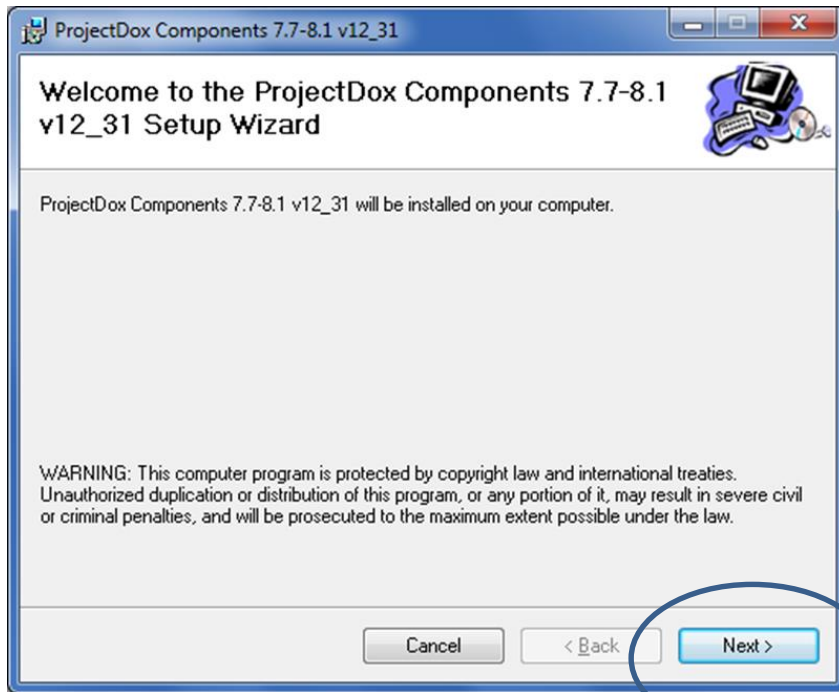


Downloading Components

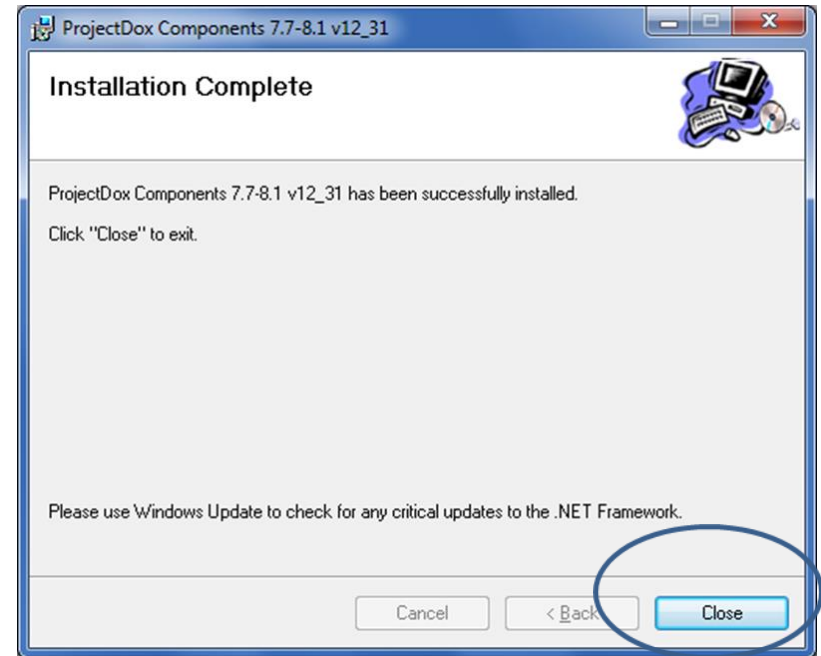
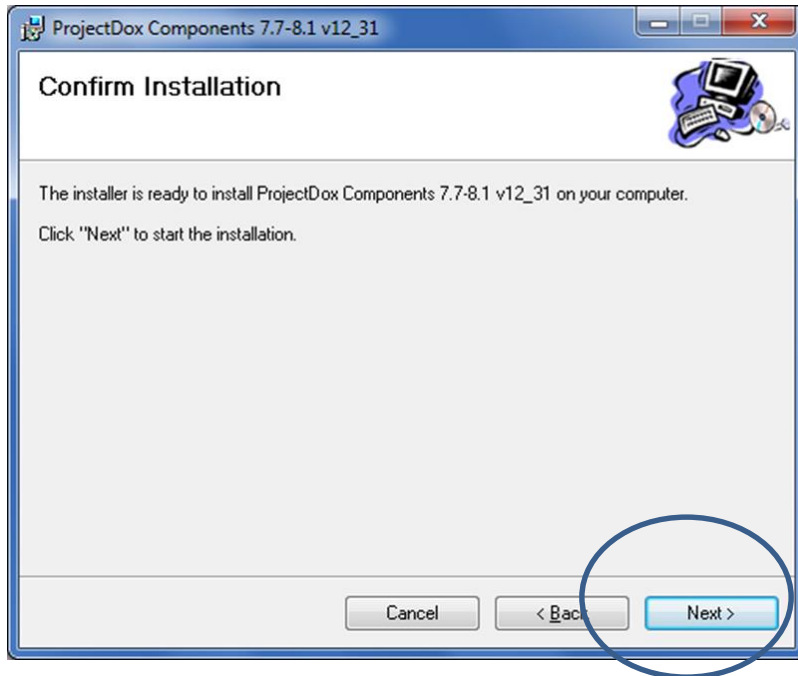
The screenshot displays the ePlanReview website interface. On the left is the City of Riverside logo featuring a golden bell. The main content area contains a login form with the heading "Enter your e-mail address and password to continue." Below this is a "TERMS AND CONDITIONS OF USE" dialog box with a scrollable text area and "Login" and "Forgot your password?" buttons. The footer includes the ProjectDox logo, copyright information for Avolve Software (© 2013), and the Avolve Software logo. Below the footer are three instructional boxes: "Install ProjectDox Components", "To create a desktop shortcut, click and drag the icon below to your desktop.", and "Click here to add City of Riverside Eplans to your Favorites." At the bottom, a Windows security warning dialog box is open, asking "Do you want to run or save ProjectDoxComponents.msi (21.0 MB) from riversideca.gov?" with a warning icon and the text "This type of file could harm your computer." The "Run" button is circled in blue.



Downloading Components Cont.



Downloading Components Cont.



Add ePlanReview to Desktop

Click on “Add the ProjectDox software icon to add to your desktop”



City of Riverside ePlanReview

Enter your e-mail address and password to continue.

TERMS AND CONDITIONS OF USE
Your access to and use of the City of Riverside ("CITY") Project DOX website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below, you accept, without limitation or qualification, these Terms and Conditions of Use. Throughout these Terms and Conditions, the words "you"

E-mail:

Password:

Login Forgot your password?

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[Install ProjectDox Component](#) To create a desktop shortcut, click and drag the icon below to your desktop. [Click here](#) to add City of Riverside Eplans to your Favorites.

javascript:addBookmark()



Add ePlan to Favorites List

To add software to internet browser's list of favorite sites:



Enter your e-mail address and password to continue.

TERMS AND CONDITIONS OF USE
Your access to and use of the City of Riverside ("CITY") Project DOX website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below, you accept, without limitation or qualification, these Terms and Conditions of Use. Throughout these Terms and Conditions, the words "you"

E-mail:

Password:

[Forgot your password?](#)

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[Install ProjectDox Component](#) To create a desktop shortcut, click and drag the icon below to your desktop. [Click here to add City of Riverside Eplans to your Favorites.](#)

javascript:addBookmark()



Access ePlan Review

The eplan customer portal and login webpage is <https://eplans.riversideca.gov/ProjectDox/index.aspx>

Your e-mail is the same as provided on the application and the same account that received the invitation email. A temporary password is provided to new ePlan users. If you forget your password, use the Forgot your password link. If you experience difficulty accessing your account, please contact us at 951-826-5800

Same email as used
for the application

Password

Enter your e-mail address and password to continue.

TERMS AND CONDITIONS OF USE
Your access to and use of the City of Riverside ("CITY") Project DOX website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below, you accept, without limitation or qualification, these Terms and Conditions of Use. Throughout these Terms and Conditions, the words "you" and "your" mean you and

E-mail:

Password:

[Forgot your password?](#)

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[Click here](#) to add City of Riverside Eplans to your Favorites.



Setting up a User Account

Provide a new password and establish the security question and answer. If your account locks out, call 826-5371 to request assistance.

Change temporary password & set security question and answer

Account details

Settings for TEST COMPANY NAME (ePlanReviewTest@gmail.com)

Welcome to City of Riverside Eplans.

Since you currently have a temporary password, you will need to change it to a permanent password and (if you have not done so) enter a security question and answer. This question/answer will be something that only you know, and will enable you to reset your password if you ever forget what it is.

After you have changed your password you will be taken to the main Projects View.

Change Password:

New password:* [redacted]

Confirm new password:* [redacted]

Password Reset Question & Answer:

Security question:* dogs name

Security answer:* toby

Password must not contain special characters, must contain at least one digit and one alphabetic character, and must be between 8 and 10 characters

Profile Information

Contact Information

User Metadata

Project Membership

Group Membership

Save

* Required field

First Name: *	TEST	Last Name: *	COMPANY NAME
Email: *	ePlanReviewTest@gmail.com	<input checked="" type="checkbox"/> HTML format	
Title:	Test Applicant		
Company:	ePlan Review Test Company		
Address 1:	Test Address		
Address 2:			
City:	Riverside		
State/Province:	CA	Postal Code:	92522
Phone:	9518265495	Fax:	
Mobile:		Pager:	
Stamps:			
Language: *	en		



Quick Reference for Plan Files

1. Plan drawings must be signed digitally or with a scanned signature, **prior to** uploading
2. Drawings must be loaded as **single page files** with the same orientation (portrait or landscape) as it would be depicted on a paper hardcopy plans.
Exception: Single Family Residential Solar PV and other Minor Projects (Patios, Pools, etc.) may download plans as a single file upload
3. The drawing files need to include **an abbreviated reference to the drawing type** (S=structural, E=electrical, P=plumbing – see following pages) to assist with faster review and improved communication

Advisory Note: Re-submission of each plan drawing file **MUST** use the same name, the same scale and the same orientation (portrait or landscape) as the originally uploaded plan page file



Quick Reference for Plan Files

File Naming Standards:

1. Filenames for drawings submitted for ePlan Review should be in traditional format that includes the first characters of the discipline name, followed by a 3-digit sheet number
2. Extended filenames (i.e., AO.1 address of project, name of applicant – site plan) **create a problem if resubmittal is required**. Brief filenames are suggested (i.e. AO.1 – site plan)
3. PLAN FOLDER – Must be in **Landscape** View Only



Quick Reference for Plan Files

ALL DRAWING FILES MUST BE SAVED IN **LANDSCAPE** ORIENTATION.

THE TOP RIGHT OF ALL DRAWINGS MUST BE RESERVED FOR THE CITY OF RIVERSIDE'S ELECTRONIC STAMP.

PLEASE LEAVE THE TOP RIGHT COMPLETELY BLANK ON ALL DRAWINGS

- Dimensions 2" width x 2" height

FILE TYPE STANDARDS

The preferred Plan Drawing file formats are DWF, vector PDF and print-ready DWG files. Multi-page plans are not accepted – **single pages are required.**



Quick Reference for Plan Files

Required Files:

- 1. Index of Drawings:** must be included, generally on the title sheet along with other information required by the City's checklist
- 2. Cover Sheet:** project cover sheet must be included in the submittal
- 3. Index Sheet:** project index sheet must include all plans with title designations

Example: A002- Second Level Floor Plan



Quick Reference for Plan Files

FILE NAMING STANDARDS: Plan page file names for drawings submitted for ePlan Review **MUST** use a traditional format to include the first characters of the discipline name, followed by a 3-digit sheet number.

EXAMPLES:

A0.1 – cover sheet	Survey
A1.0 – all site plans, including site demo plan, enlarged area site plans, etc	Civil – C1.0; C1.1; C1.2
A2.0 – demo plans, floor plans, roof plans	Electrical – E1.0; E1.1; E1.2
A3.0 – large scale sections	GN 1.0 – General Notes; GN1.1
A4.0 - exterior elevations	Mechanical – M1.0; M1.1
A5.0 – enlarged plans and sections (example: stairs, walls sections	Plumbing – P1.0; P1.1; P1.2
A6.0 - details	Structural – S1.0; S1.1
A8.0 – control systems	Lighting, Fire Protection, Security, Signage, landscaping, interior elevations



Quick Reference for Plan Files

Documents folder:

DOC FOLDER – 8 ½ X 11

Alternate Method	T24 Energy
Soils Report	Structural Calculations



Plan Review Pre-Screening

1. City staff will review the drawings and supporting documents for pre-screening
2. Pre-Screening will check for receipt of all needed plans/documentation (plan drawings, calculations, etc.) and advise the applicant of fees due. **Note: If you are Denied, please reaccept your task and retry the upload again**
3. Upon receipt of all required information and the payment of fees due, staff will simultaneously route the permit or project to the applicable City review groups and disciplines



Adding Files

- ❑ Staff will prescreen each application prior to allowing applicants access to upload the plan files and documents for the permit or project. You will receive an email when ePlan Review will accept documents. This option will be turned off during the plan check process and turned back on for re-submittal.
- ❑ Please see Slides 22 – 27 for the file naming convention.
- ❑ Click the Project Access to log into the project noted in the email. If desired, click Login to ProjectDox to access your account. All projects you have started or have been invited to will be in your account.



Sample email:

Upload Confirmation Task Assignment

Attention TEST:

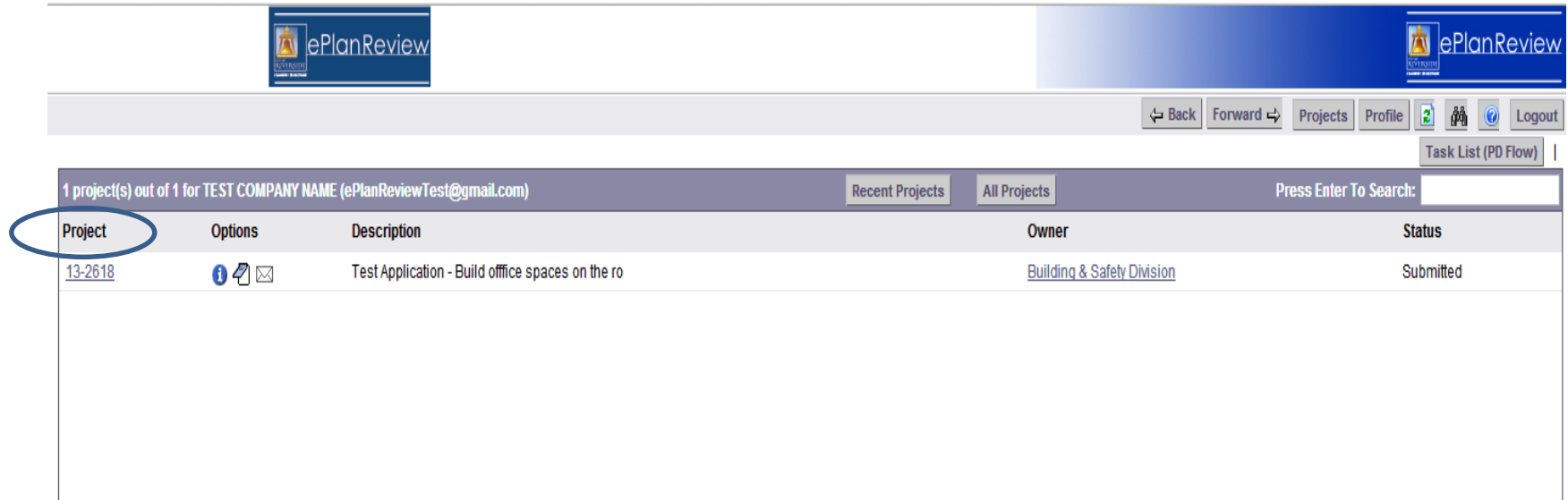
When you have completed your upload, please you have completed your upload, please [Login to ProjectDox](#) and complete the "Upload Confirmation" task.

Project:	13-2618
Description:	Test Application - Build office spaces on the ro
Task:	ApplicantUpload
Assigned by:	Carlie Myers
Project Access Login to ProjectDox	






Adding Files

- ❑ Click the project to open the folders. If you have more than one project in ePlan, all will be listed.
- ❑ Sample dashboard in ePlan Review:

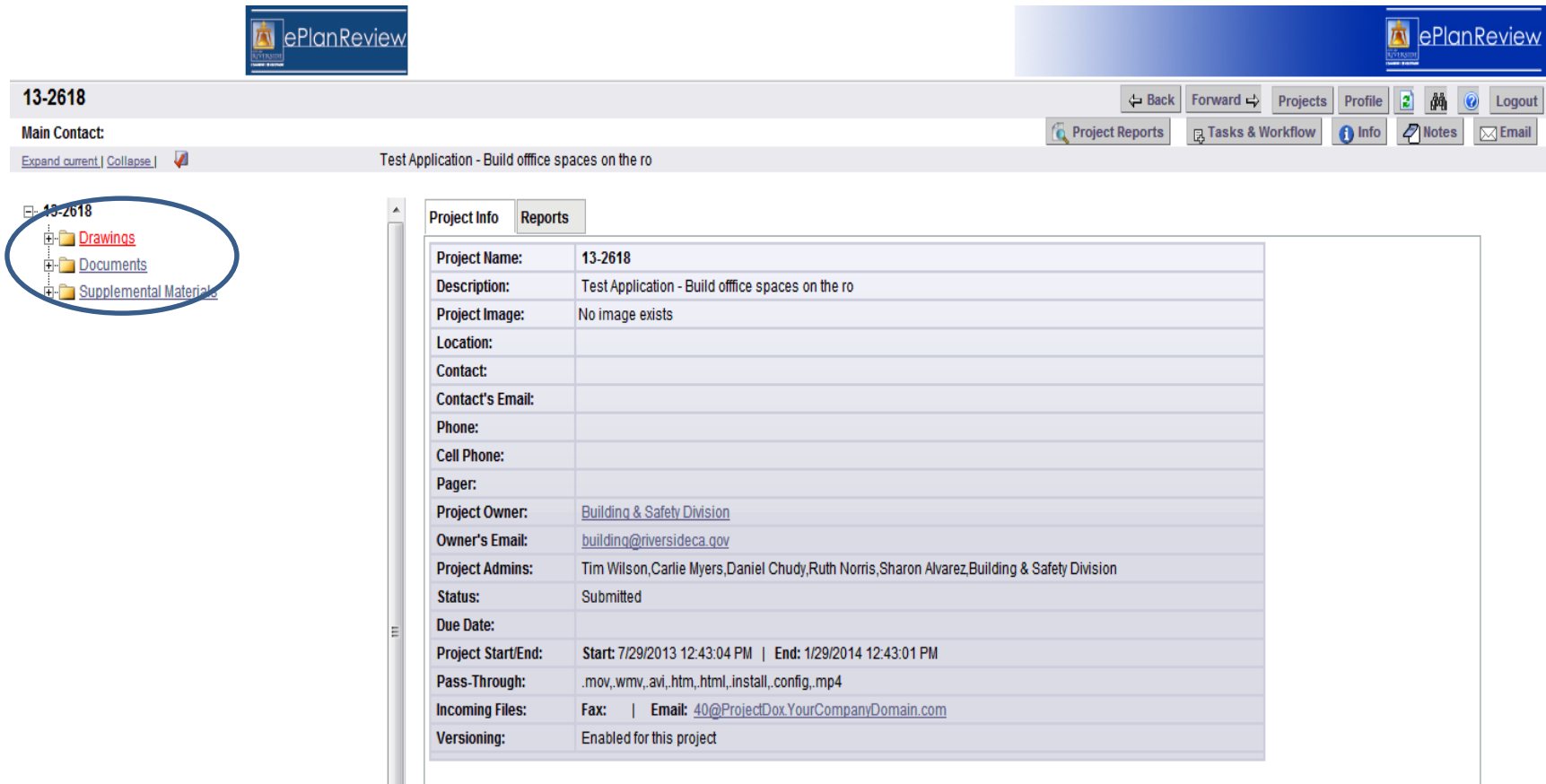


The screenshot displays the ePlan Review web interface. At the top, there are two ePlan Review logos. Below the logos is a navigation bar with buttons for Back, Forward, Projects, Profile, and Logout. A search bar is located on the right side of the navigation bar. The main content area shows a table of projects. The table has columns for Project, Options, Description, Owner, and Status. The first row of the table is highlighted, and the 'Project' column value '13-2618' is circled in blue. The table also includes a search bar and tabs for 'Recent Projects' and 'All Projects'.

Project	Options	Description	Owner	Status
13-2618	  	Test Application - Build office spaces on the ro	Building & Safety Division	Submitted

Adding Files

❑ Select the appropriate file folder for each document type:



The screenshot shows the ePlanReview web application interface. The top navigation bar includes the ePlanReview logo and a navigation menu with buttons for Back, Forward, Projects, Profile, Logout, Project Reports, Tasks & Workflow, Info, Notes, and Email. The main content area displays project information for project 13-2618, titled "Test Application - Build office spaces on the ro". The left sidebar shows a folder tree for project 13-2618, with the "Drawings" folder highlighted by a blue circle. The project information table is as follows:

Project Info	Reports
Project Name:	13-2618
Description:	Test Application - Build office spaces on the ro
Project Image:	No image exists
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Building & Safety Division
Owner's Email:	building@riversideca.gov
Project Admins:	Tim Wilson, Carlie Myers, Daniel Chudy, Ruth Norris, Sharon Alvarez, Building & Safety Division
Status:	Submitted
Due Date:	
Project Start/End:	Start: 7/29/2013 12:43:04 PM End: 1/29/2014 12:43:01 PM
Pass-Through:	.mov, .wmv, .avi, .htm, .html, .install, .config, .mp4
Incoming Files:	Fax: Email: 40@ProjectDox.YourCompanyDomain.com
Versioning:	Enabled for this project

Adding Files



13-2618

Main Contact:

Folder: [13-2618\Drawings](#)

Test Application - Build office spaces on the ro

No files currently exist in **Drawings**.

To upload files into this folder
(1) Click the Upload button below
(2) Follow the instructions in the pop-up window

Large files may take a few minutes to be processed. Click the Refresh button at the top of the page to refresh your file list view.

[View Folders](#)

[Upload Files](#)

[Upload Files](#)

Project Info **Reports**

Project Name:	13-2618
Description:	Test Application - Build office spaces on the ro
Project Image:	No image exists
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Building & Safety Division
Owner's Email:	building@riversideca.gov
Project Admins:	Tim Wilson,Carlie Myers,Daniel Chudy,Ruth Norris,Sharon Alvarez,Building & Safety
Status:	Submitted
Due Date:	
Project Start/End:	Start: 7/29/2013 12:43:04 PM End: 1/29/2014 12:43:01 PM
Pass-Through:	.mov,.wmv,.avi,.htm,.html,.install,.config,.mp4
Incoming Files:	Fax: Email: 40@ProjectDox.YourCompanyDomain.com
Versioning:	Enabled for this project



Adding Files



Upload files:

Selected Files:

← Drag the file(s) into the box or

← Browse your computer to select file(s)

Upload URL:

URL Display Name:

URL:



Adding Files

- ❑ The files to be uploaded will be listed in the **Selected Files** box
- ❑ When ready, click **Upload** to add all documents into the project/permit.



Upload files:

Selected Files:

plan layout1.dwg	278.71 KB	✕
plan1.dwg	278.71 KB	✕

Total **0%** **557.42 KB**

Upload URL:

URL Display Name:

URL:



Confirm Upload Complete

You will receive an email requesting confirmation that the files loaded into the project are the complete set needed for submission. This process is how you communicate with staff that you are ready to begin the plan check process:

Sample email:



Upload Confirmation Task Assignment

Attention TEST:

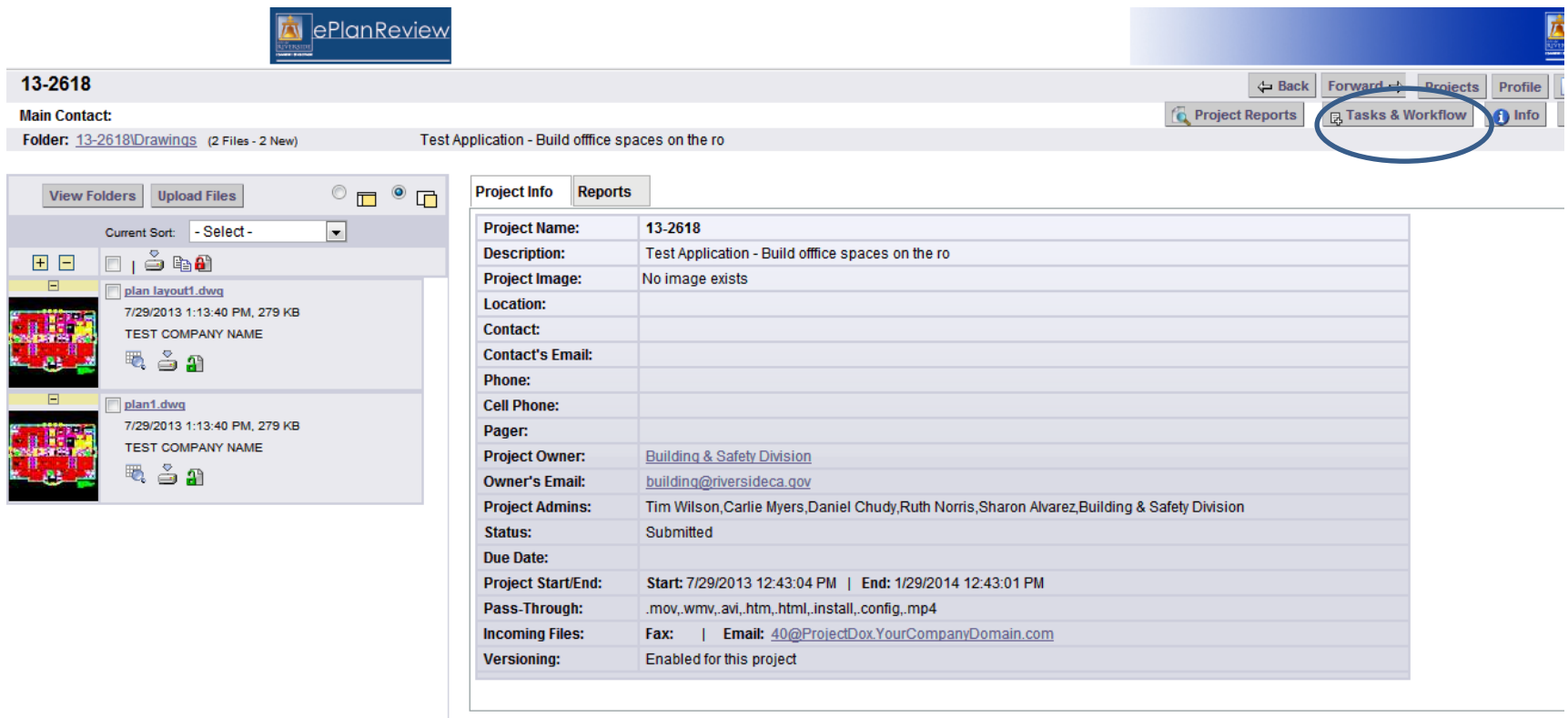
When you have completed your upload, please you have completed your upload, please [Login to ProjectDox](#) and complete the "Upload Confirmation" task.

Project:	13-2618
Description:	Test Application - Build office spaces on the ro
Task:	ApplicantUpload
Assigned by:	Carlie Myers
Project Access Login to ProjectDox	



Starting the Plan Review

You will see the files uploaded for the permit or project. When you are done loading, click the **“Tasks and Workflow”** option. Tasks and Workflow control the file permissions for the plan check process:



The screenshot displays the ePlanReview web application interface. At the top, the ePlanReview logo is visible. The main header shows the project ID "13-2618" and the main contact information. A navigation bar includes buttons for "Back", "Forward", "Projects", "Profile", "Project Reports", "Tasks & Workflow" (circled in blue), and "Info". Below the header, the folder path is "13-2618\Drawings" containing 2 files. The project description is "Test Application - Build office spaces on the ro".

The interface is divided into two main sections: a file upload area on the left and a project information area on the right.

File Upload Area:

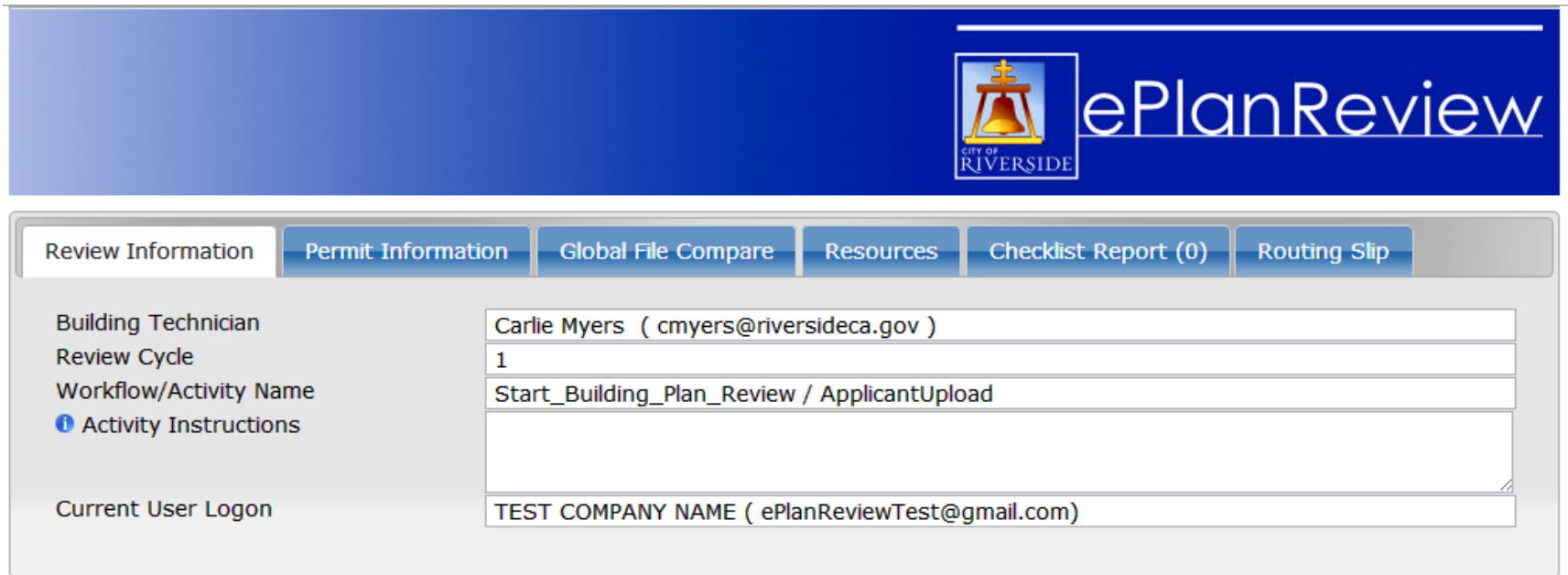
- Buttons: View Folders, Upload Files
- Current Sort: - Select -
- Files listed:
 - plan_layout1.dwg: 7/29/2013 1:13:40 PM, 279 KB, TEST COMPANY NAME
 - plan1.dwg: 7/29/2013 1:13:40 PM, 279 KB, TEST COMPANY NAME

Project Information Area:

Project Info	Reports
Project Name:	13-2618
Description:	Test Application - Build office spaces on the ro
Project Image:	No image exists
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Building & Safety Division
Owner's Email:	building@riversideca.gov
Project Admins:	Tim Wilson,Carlie Myers,Daniel Chudy,Ruth Norris,Sharon Alvarez,Building & Safety Division
Status:	Submitted
Due Date:	
Project Start/End:	Start: 7/29/2013 12:43:04 PM End: 1/29/2014 12:43:01 PM
Pass-Through:	.mov,.wmv,.avi,.htm,.html,.install,.config,.mp4
Incoming Files:	Fax: Email: YourCompanyDomain.com">40@ProjectDox>YourCompanyDomain.com
Versioning:	Enabled for this project

Starting the Plan Review

This screen will appear when you have completed submitting files. **Upload Complete** will tell City staff that they need to begin the plan review process. **Save and Close** means “save what I have done, but I am going to come back later to add more”. **Until Upload Complete is selected, the project status will remain with the applicant:**



Review Information	Permit Information	Global File Compare	Resources	Checklist Report (0)	Routing Slip
Building Technician	Carlie Myers (cmyers@riversideca.gov)				
Review Cycle	1				
Workflow/Activity Name	Start_Building_Plan_Review / ApplicantUpload				
Activity Instructions					
Current User Logon	TEST COMPANY NAME (ePlanReviewTest@gmail.com)				

After you have successfully uploaded all required plans/documents please select (Upload Complete) button.

Upload Complete Save And Close



Plan Check Process

- ❑ Each reviewer will have the opportunity to review, make comments, request changes, and/or provide conditions to the applicant.
- ❑ When **all** required reviewers have completed the plan check task, the list of comments, corrections and or conditions will be sent by City staff to the applicant via email.
- ❑ The applicant will have access to review each mark up and make the required adjustments to the plan or documents. Applicants will now have access to upload new files to the permit or project.
- ❑ Only plan files with corrections need to be re-submitted. **Resubmitted files MUST have the same file name as the original document.** (See slides 11 - 14). ePlan Review will version each file, putting the most recent on top, thus providing plan check staff with a faster, more efficient review process.



Accepting the Task for Corrections

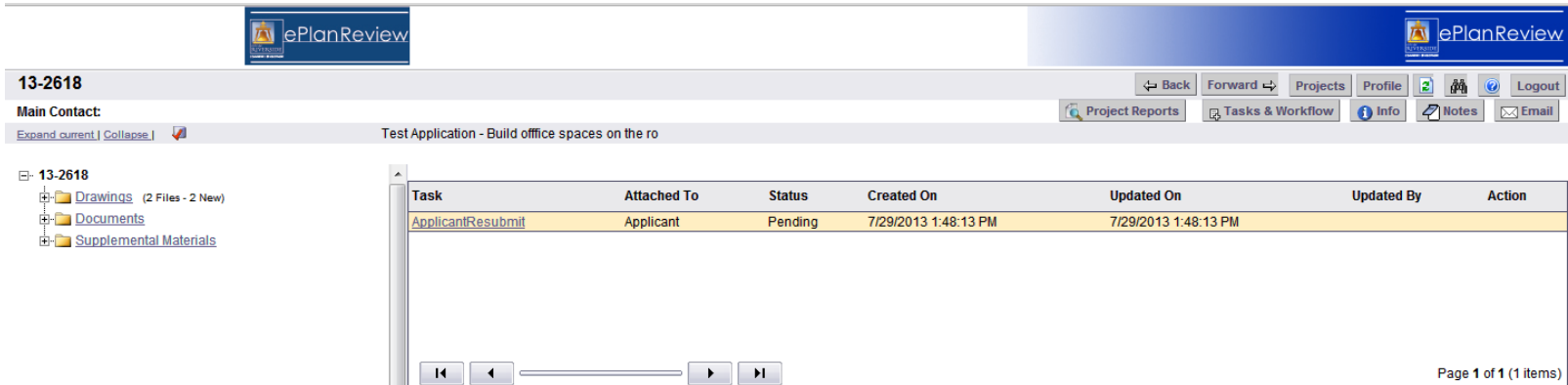
Tasks and Workflow will start the process:

The screenshot shows the ePlanReview web application interface. The top navigation bar includes the ePlanReview logo and a menu with options: Back, Forward, Projects, Profile, Logout, Project Reports, **Tasks & Workflow** (circled in red), Info, Notes, and Email. A blue arrow points from the 'Tasks & Workflow' button to a tooltip that says 'view workflow task list'. Below the navigation bar, the project name '13-2618' and 'Main Contact:' are visible. The main content area is divided into 'Project Info' and 'Reports' tabs. The 'Project Info' tab is active, displaying the following project details:

Project Name:	13-2618
Description:	Test Application - Build office spaces on the ro
Project Image:	No image exists
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Building & Safety Division
Owner's Email:	building@riversideca.gov
Project Admins:	Tim Wilson,Carlie Myers,Daniel Chudy,Ruth Norris,Sharon Alvarez,Building & Safety Division
Status:	Resubmit Request
Due Date:	
Project Start/End:	Start: 7/29/2013 12:43:04 PM End: 1/29/2014 12:43:01 PM
Pass-Through:	.mov,.wmv,.avi,.htm,.html,.install,.config,.mp4
Incoming Files:	Fax: Email: 40@ProjectDox.YourCompanyDomain.com
Versioning:	Enabled for this project

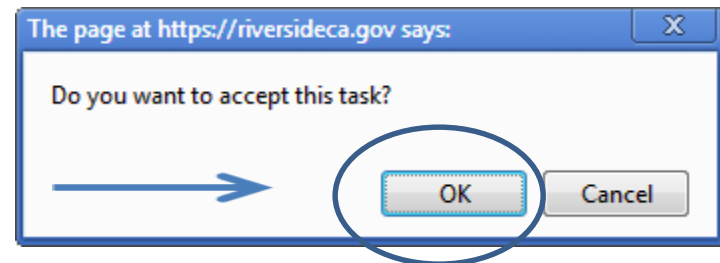
Accepting the Task for Corrections

Click OK to accept the task. This feature is included for applicants that have provided project access to multiple staff members or other vested parties involved in the project. Accepting the task moves the workflow to the responsible user:



The screenshot shows the ePlanReview web application interface. The top navigation bar includes the ePlanReview logo and a user profile icon. Below the navigation bar, there are several tabs: Back, Forward, Projects, Profile, Logout, Project Reports, Tasks & Workflow, Info, Notes, and Email. The main content area displays a task list for project 13-2618. The task list has the following columns: Task, Attached To, Status, Created On, Updated On, Updated By, and Action. A single task is listed: ApplicantResubmit, Attached To: Applicant, Status: Pending, Created On: 7/29/2013 1:48:13 PM, Updated On: 7/29/2013 1:48:13 PM. The page number is 1 of 1 (1 items).

Task	Attached To	Status	Created On	Updated On	Updated By	Action
ApplicantResubmit	Applicant	Pending	7/29/2013 1:48:13 PM	7/29/2013 1:48:13 PM		



Review Corrections

This sample email advises that the plan check process has been completed and corrections are needed. Access the project to view the corrections:



Review Correction Request Task Assignment

Attention TEST:

Your plan review submission for Project: **13-2618** has been reviewed and corrections have been requested. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please [Login to ProjectDox](#) and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to prevent your application from expiring.

Project:	13-2618
Description:	Test Application - Build office spaces on the ro
Task:	ApplicantResubmit
Assigned by:	Carlie Myers
Project Access Login to ProjectDox	



Viewing Changelogmarks

The workflow will show the **changelogmarks** requested by all of plan check review staff involved in the project. Click into the files to view the markup, the details will be listed on the same line as the thumbnail image:

Review Information	Permit Information	Global File Compare	Resources	Checklist Report (0)	Routing Slip
Building Technician	Carlie Myers (cmyers@riversideca.gov)				
Review Cycle	1				
Workflow/Activity Name	Start_Building_Plan_Review / ApplicantResubmit				
Activity Instructions	Please review all sections of the eForm and drawing markups and resubmit the required information prior to completion of task.				
Current User Logon	TEST COMPANY NAME (ePlanReviewTest@gmail.com)				

CHANGEMARKS

Filter by Department:

[Click Here to Load Changelogmarks...](#)

Resolved	File	Cycle	Department	File	Markup	Description	Details	Applicant Response
No		1	Building Non Struct Comm	plan1.dwg	CMyers_Building	Mens Room Access	ADA requires additional square footage	

Save Changelogmark Updates



Project Status when Pending Corrections

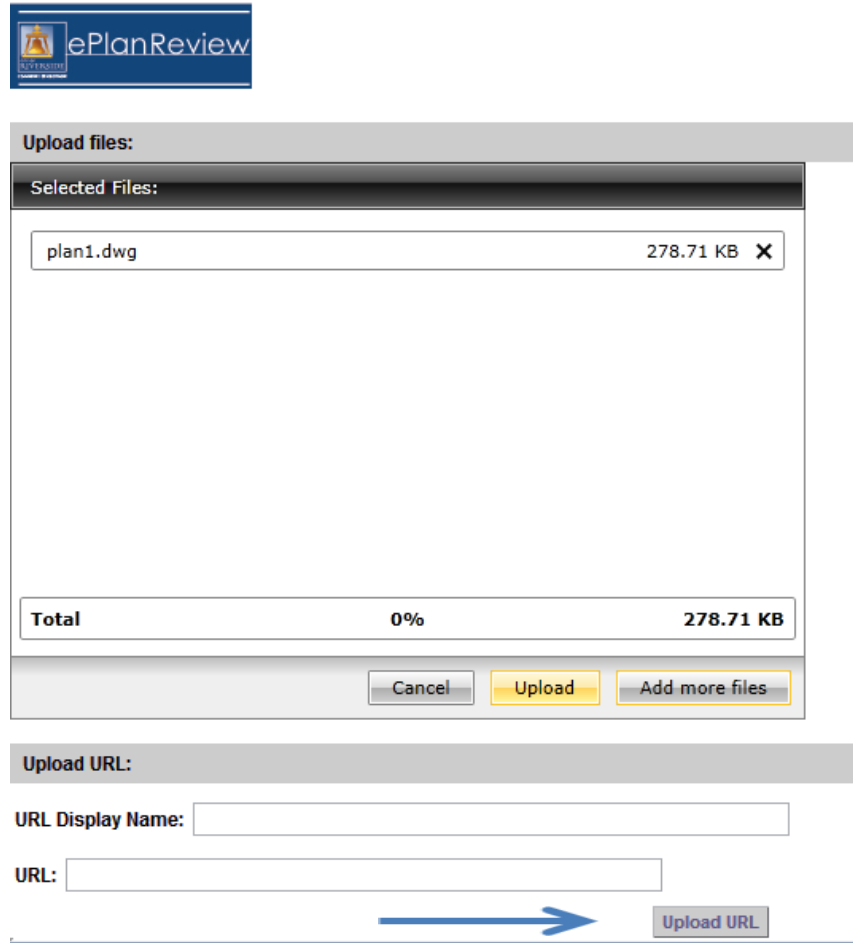
The status of the workflow will change back to the applicant to re-submit files:

The screenshot displays the ePlanReview web application interface. At the top, the 'ePlanReview' logo is visible on the left and right. The main header area includes the project ID '13-2618' and navigation buttons for 'Back', 'Forward', 'Projects', 'Profile', 'Project Reports', 'Tasks & Workflow', 'Info', and 'Notes'. Below the header, the 'Main Contact' section is empty, and the 'Folder' is set to '13-2618\Drawings (2 Files - 2 New)'. The main content area shows a table of tasks. The first task, 'ApplicantResubmit', is highlighted with a blue circle. The table has columns for Task, Attached To, Status, Created On, Updated On, and Updated By. Below the table, there are navigation controls and a 'Page 1' indicator.

Task	Attached To	Status	Created On	Updated On	Updated By
ApplicantResubmit	Applicant	Accepted	7/29/2013 1:48:13 PM	7/29/2013 1:52:39 PM	ePlanReviewTest@gmail.com

Uploading Corrected Files

- ❑ The process to re-upload files is exactly the same as the original file upload
- ❑ Revised files **MUST** use the same file name, orientation (portrait or landscape) and scaling for re-submission



The screenshot displays the ePlanReview web interface. At the top left is the ePlanReview logo. Below it, the 'Upload files:' section is active. A 'Selected Files:' window shows a single file, 'plan1.dwg', with a size of 278.71 KB and a close button (X). Below the file list, a progress bar indicates 'Total' upload of 0% for 278.71 KB. At the bottom of this section are three buttons: 'Cancel', 'Upload', and 'Add more files'. Below the upload section is the 'Upload URL:' section, which includes a 'URL Display Name:' text box, a 'URL:' text box, and an 'Upload URL' button. A blue arrow points from the 'Upload URL' button back to the 'Upload' button in the section above.

Confirmation of Resubmitted Files

Using the same name creates a versioning process, the most recent always on top, and makes for a much faster plan review process. Uploading revised files with new names will create a formal correction to submit under the same file name:



[Close Window](#)

Your files have been uploaded.

1. **plan1.dwg**

Files highlighted in **blue** are **version candidates**.
They will be versioned **if** the file content has been changed in any way.

Close



Complete the Resubmission

When all of the corrected files have been loaded, you will need to advise staff that your portion of the process has been complete. Click the **Tasks & Workflow** button:

13-2618

Main Contact:

Folder: [13-2618Drawings](#) (2 Files - 2 New) Test Application - Build office spaces on the ro

View Folders Upload Files

Current Sort: - Select -


Task	Attached To	Status	Created On	Updated On	Updated By
ApplicantResubmit	Applicant	Accepted	7/29/2013 1:48:13 PM	7/29/2013 1:52:39 PM	ePlanReviewTest@gmail.c

plan layout1.dwg
7/29/2013 1:13:40 PM, 279 KB
TEST COMPANY NAME

plan1.dwg
7/29/2013 1:13:40 PM, 279 KB
TEST COMPANY NAME

Completing Resubmission


A very similar form to the one used for the first submittal will require confirmation from the applicant that they are done uploading files. Scroll down this form to the screen listed in the next slide:

ePlanReview

Review Information Permit Information Global File Compare Resources Checklist Report (0) Routing Slip

Building Technician	Carlie Myers (cmyers@riversideca.gov)
Review Cycle	1
Workflow/Activity Name	Start_Building_Plan_Review / ApplicantResubmit
Activity Instructions	Please review all sections of the eForm and drawing markups and resubmit the required information prior to completion of task.
Current User Logon	TEST COMPANY NAME (ePlanReviewTest@gmail.com)

CHANGEMARKS

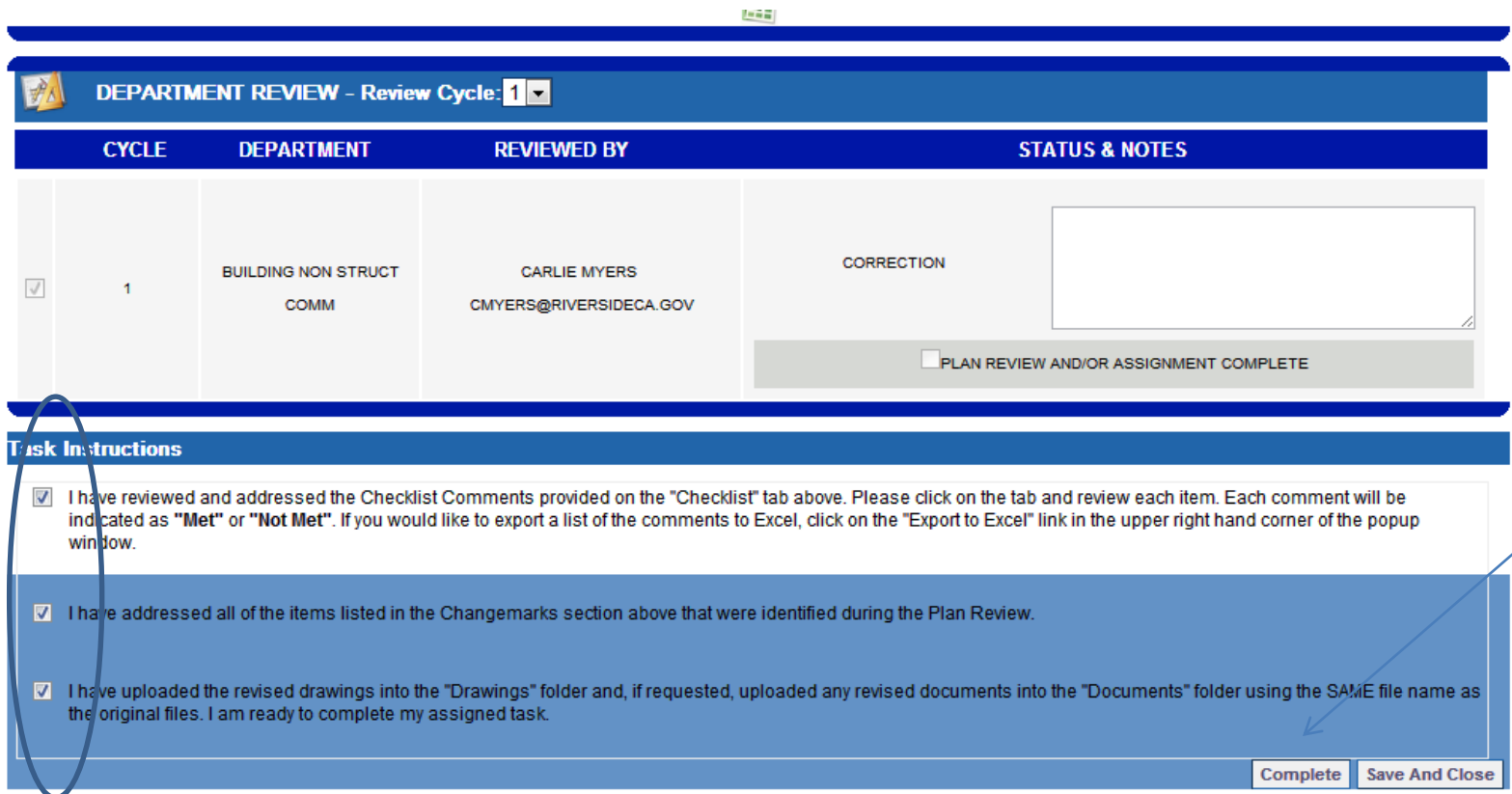
Filter by Department: 

[Click Here to Load Changemarks...](#)



Final Step for Resubmission

The workflow will require confirmation that the checklist items were met. When done, click **Complete** to start plan check. This process will repeat until the project is deemed approved. Approved permits and projects are Stamped and the files will move into an **Approved Files** (folder not visible until approved):



DEPARTMENT REVIEW - Review Cycle: 1

CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
<input checked="" type="checkbox"/>	1	BUILDING NON STRUCT COMM	CARLIE MYERS CMYERS@RIVERSIDECA.GOV
			CORRECTION
			<input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE

Task Instructions

- I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Please click on the tab and review each item. Each comment will be indicated as "Met" or "Not Met". If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the upper right hand corner of the popup window.
- I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.
- I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. I am ready to complete my assigned task.



Stamped Approved Plans

An email will be sent to the applicant(s) advising that the permit or project has been approved. Once the permit fees have been paid, the plans will be stamped and released for duplication. All approved files will be in a file labeled “**Approved files**”. The stamped plans include the permit or project number. All approved files will be available for downloading by the applicant(s). A stamped printed copy of the plans shall be made available at the job site for the Building Inspector’s visit and inspection review:



New Batch File Stamp Notification

One or more files have been batch stamped and added to the project listed below.

Project:	13-2618
Path:	13-2618\Approved
Stamped by:	Carlie Myers
Stamped Files Access Login to ProjectDox	

Original files that were stamped:

1. [plan layout1.dwg](#)
2. [plan1.dwg](#)